



Customer success management through alignment of marketing, sales and IT

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ABSTRACT

Digitalization unites marketing, sales and IT (M-S-I) actors in the context of customer interactions. However, currently, little is known about the dynamics underlying the interplay and the alignment of these three actors. Additionally, salespeople are increasingly challenged by customer success management (CSM) for remaining accountable to customers in the postpurchase phase of customers' journeys. This study examines the organizational alignment of M-S-I actors using a qualitative approach. Interviews were conducted in the context of a case study of four matched triads of M-S-I actors—including the executive directors of each company—throughout the customer journey to explore the dynamics underlying this trilateral alignment. The findings demonstrate six dimensions and twenty attributes of alignment, which are integrated into the *COMPLY* framework to provide guidance regarding how to adjust the alignment among M-S-I actors. This approach results in the discovery of novel key propositions for intradimensional alignment and ultimately interdimensional interventions, thereby revealing ways in which researchers and managers can analyze and adjust alignment among M-S-I actors, with the ultimate goal of facilitating CSM more effectively. This study contributes to existing models of alignment as well as to CSM research and provides guidance on how to analyze and adjust alignment for organizational M-S-I actors.

1. Introduction

Customer success management (CSM), as a manifestation of the consistent focus of a supplier organization on the success of its customers in terms of the products or services the organization provides (Prohl-Schwenke & Kleinaltenkamp, 2021), can put tremendous pressure on sales actors, particularly in the B2B sector, because it entails further pre- and postpurchase responsibilities. Sales actors can no longer delegate responsibility for newly acquired accounts; they remain responsible for the customer experience and become cross-functional relationship managers (Ballestra, Cardinali, Palanga, & Pacelli, 2017). This situation highlights a recently noted point in the customer solutions literature that emphasizes the customer's view of selling as an ongoing process that persists even after purchasing (e.g., Panagopoulos, Rapp, & Ogilvie, 2017; Ulaga & Kohli, 2018). CSM is designed to overcome a possible

patchwork of interactions with several actors (Kalbach, 2020), which means that sales actors also improve their skills at multiple touch points they have not yet used and adapt to new interactions and interfaces. For example, digitally empowered customers challenge sales actors by using IT-enabled tools, e.g., through websites and social networks to obtain competitive information and referrals (Andzulis, Panagopoulos, & Rapp, 2012), and by expecting direct interactions and engagements through these networks or similar interfaces (Agnihotri, Dingus, Hu, & Krush, 2016). In parallel, IT has enabled marketing and sales actors to change their way of promoting products (Graesch, Hensel-Börner, & Henseler, 2020; Saura, Palos-Sánchez, & Cerdá Suárez, 2017). Accordingly, successful CSM should encompass all phases of the customer journey, which typically include marketing, sales, and after-sales functions throughout the prepurchase, purchase and postpurchase phases; such phases are reinforced by IT capabilities resulting from digitalization.

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In B2B organizations, CSM is becoming increasingly important and is considered a new customer management practice (Hilton, Hajjhashemi, Henderson, & Palmatier, 2020). CSM entails monitoring, securing and enhancing customer success as well as implementing the necessary organizational structures and processes within the supplier firm to maximize both customer and company value (Prohl-Schwenke & Kleinaltenkamp, 2021). Scholars have predicted that CSM will lead to new functional units and job roles, which involve the continual adaptation of sales roles (Zoltners, Sinha, Sahay, & Shastri, 2021).

In retrospect, a never-ending battle between marketing and sales has occurred (e.g., Kotler, Rackham, & Krishnaswamy, 2006; Massey, 2012) over the past two decades, in which context the alignment between these two actors has been extensively studied. Simultaneously, managing CRM tools effectively has become increasingly relevant in recent years, a task that undoubtedly includes alignment between sales and IT actors. (e.g., Reinartz, Krafft, & Hoyer, 2004). Thus, several years later, these insights into alignment can be used to help jointly understand the alignment of all three parties, i.e., marketing, sales, and IT (M-S-I) actors. For instance, CSM requires robust digital support systems (Zoltners, Sinha, Sahay, & Shastri, 2021), including generative AI and digital customer touchpoints (Murphy, 2023), and requires sales actors to align and collaborate with other actors to facilitate these multiple customer touchpoints (Hochstein, Rangarajan, Mehta, & Kocher, 2020). Accordingly, marketing and sales actors are dependent on IT actors' support and participation in completing their tasks during customer interaction, and it is important for these actors that this interplay is aligned. To our knowledge, there have been no reputable investigations or conceptual studies about the organizational alignment of marketing, sales and IT together, and this represents a gap in the research due to customer demand and CSM being highly relevant, as outlined above.

This complication raises the question of how the interplay of marketing, sales, and IT actors is aligned in the context of customer interactions and how this alignment can be adjusted, which is the central research question of this paper. The aim of this study is to analyze the interplay, explore the elements of alignment among M-S-I actors and determine how the potential alignment can be adjusted. Accordingly, an in-depth investigation was conducted by means of a case study of industrial companies that have benefitted from digitalized marketing, digitalized sales activities, and IT developments in various sectors and that have already included CSM in at least one of their business units. Specifically, the customer journey model was used as an auxiliary vehicle to explore the working relationships among the M-S-I actors and their alignment: this model reflects the prepurchase and postpurchase customer touchpoints for customer interaction that are relevant to CSM.

This paper focuses on managers as actors in the context of the sales function, including personal selling, closing transactions and after-sales services such as key account management; from the marketing function, including product promotion and brand management; and IT actors, who provide the necessary infrastructure, including software and hardware but also develop digital products by overseeing rollout and technical support for customers. Thus, the new demands of CSM require M-S-I actors to align with one another throughout the entire customer journey, ranging from early product awareness to purchase and brand loyalty, which this study addresses.

The findings of our study reveal both interdimensional and intradimensional alignment among the M-S-I actors, including attributes and propositions that facilitate customer interactions and CSM in general, resulting in the *COMPLY* framework for analyzing and adjusting alignment. The alignment consists of six identified dimensions, namely, *Communication & information*, *Objectives*, *Mindset & orientations*, *Power*, *Linkages & resources*, and *Yielded knowledge & skills*, which cover 20 intradimensional attributes. For all the attributes thus identified, the study's findings provide guidance on how to adjust the alignment per dimension in the form of novel key propositions and interventions that can benefit both managers and scholars. The *COMPLY* framework contributes to the understanding of M-S-I alignment in several ways: it

updates previous models of alignment, e.g., by identifying new relevant dimensions and attributes; it transfers this discussion into the context of all M-S-I actors simultaneously; and it addresses the challenge of how to adjust alignment most effectively. Ultimately, the findings of this research can be used as a coordination mechanism to promote the ability of sales actors to fulfill the CSM role.

The remainder of this paper is organized as follows. First, we review the literature on conceptual alignment studies, in which context we identify existing domains and constructs associated with M-S alignment. This is followed by a review of the theoretical background on key concepts such as CSM, the customer journey and alignment and a framing of the theoretical lens through which we look at alignment. Next, we document the methodology of our case study and introduce the interviewees. In the "Results" section, we present the newly discovered dimension and attributes, confirm the existing dimensions in terms of alignment and illustrate these dimensions by reference to quotations from the respondents. The dimensions are subsequently used to create a framework for alignment. We conclude by presenting the relevant implications for academic research and managerial practice as well as the limitations of this research and directions for future research.

2. Theoretical background

2.1. Customer success management

Customer success management (CSM) is receiving increasing attention in the context of B2B marketing; although it has been neglected for a long time in academia, it impacts both sales and marketing tasks as well as organizational setups (Eggert, Ulaga, & Gehring, 2020). CSM has its roots in customer relationship management (CRM): until the 1990s, marketing focused on customer transactions, and relationship marketing emerged in the early 2000s (Pansari & Kumar, 2017). While concepts related to CRM previously tended to view the customer as a passive recipient of products, services, or value in general, contemporary customers tend to be more active players in the value creation process. This situation gave rise to the concept of customer engagement, which is still valid today and views customers as cocreators (Bijmolt et al., 2010; Pansari & Kumar, 2017).

Based on the assumption that CRM concepts build on each other, CSM has emerged as the latest evolution of this approach. This concept considers customer loyalty and customer engagement but goes further by placing customer goal achievement ahead of engagement behavior (Hilton et al., 2020). As a result, CSM is the next step in the evolution of customer relationship management. The new challenges posed by the shift in business models from license sales to subscriptions, such as the software-as-a-service model, represent a key driver of the CSM approach (Eggert et al., 2020; Hochstein et al., 2020), thereby shifting the balance of power to the customer and increasing the scope of sales responsibilities and tasks, in particular regarding technological influence; this shift leads to a profound change in customer interactions (Fischer, Seidenstricker, & Poepplbus, 2023; Rodríguez, Svensson, & Mehl, 2020).

In addition, CSM relies on regular proactive interactions between the sales organization and the customer to both demonstrate (Hochstein, Chaker, Rangarajan, Nagel, & Hartmann, 2021) and secure the value created by the organization's products and services (Hochstein et al., 2020). By acting proactively and focusing on developing and advising customers, CSM delivers much more than traditional account management or sales (Mehta, Pickens, & Martinez, 2020).

Accordingly, sales actors face increasing customer interactions and demands throughout the entire customer journey alongside the influence of IT.

2.2. Customer journey

The notion of the customer journey is rooted in both service

management and multichannel management (e.g., Neslin et al., 2006). Based on the current state of related research, the customer journey is defined in terms of customer interactions during the purchase cycle across several stages of the progression from prepurchase through the purchase to postpurchase phases. Each phase consists of one or more stages, which in turn contain several customer touchpoints that represent any type of interaction with the actual or potential customer, such as with the product, the company, marketing elements or the brand (Baxendale, Macdonald, & Wilson, 2015; Hanssens, Pauwels, Srinivasan, Vanhuele, & Yildirim, 2014). The three main phases mentioned above include stages such as *be aware*, *consider*, *evaluate*, *purchase*, *confirm*, and *bond*, which are consistent with the terminology in general use, for example, by Edelman and Singer (2015). The customer journey has been conceptualized as a recurring loop, as shown in Fig. 1. Although the *be aware* stage has been separated from this loop, as in the recent studies conducted by Edelman and Singer (2015) and Court, Elzinga, Mulder, and Vetvik (2009), because customers who make subsequent purchases at the same place are already aware of the brand and consider the next product accordingly, this situation is certainly the case in B2B environments.

The notion of the customer journey is used in this study to frame CSM by including early stages of customer interactions as well as customer interactions after purchasing. Practically speaking, during the *consider* phase, customers may ask why a product is beneficial to their business and compare it to other options. The selling organization can respond with marketing materials and sales pitches. After the purchase, customers seek to *confirm* that these products are successfully adding value to their business, and salespeople stay in the loop to support the customer, using IT interfaces or tools to demonstrate and measure them. This approach is also applicable to other stages, as sales actors may need to continuously demonstrate success for all of their products. This analysis of phases is a novel vehicle for investigating the interplay and alignment of M-S-I actors dynamically.

2.3. Alignment

To our knowledge, no comprehensive theory of alignment has been applied to organizational actors. Based on Nadler and Tushman (1977) and Graesch, Hensel-Börner, and Henseler (2022) we define alignment as “the degree to which the needs, demands, goals, objectives, and/or structures of one actor are consistent with the needs, demands, goals, objectives, and/or structures of another actor”.

According to Homans (1961) characterization of social exchange

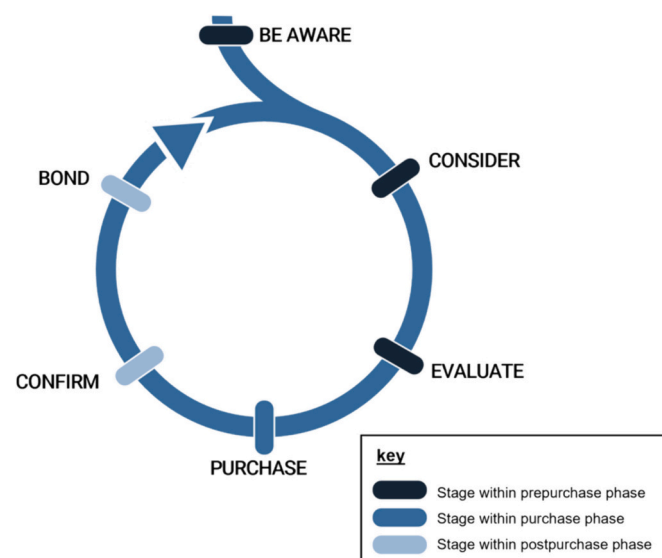


Fig. 1. Customer Journey Cycle.

theory (SET), actors tend to engage in exchange behavior that is generally rewarded (DeLamater & Ward, 2013). Blau (1964) emphasizes the main tenet of SET as voluntary interactions of actors motivated by expected returns. That is, the more valuable the outcome of an exchange action is to an actor, the more likely that action is to be performed. The opposite claim is also true, i.e., an exchange that is not rewarded will most likely not be performed. According to Molm (1988), SET can serve as an effective coordination mechanism for aligning actors’ interests.

The exchanges among actors can be applied to any action performed by the individual M-S-I actors. For example, an actor always considers whether the outcome would be more valuable if this actor were to perform a customer interaction alone, together with another actor, or even by allocating the task to the other actor. According to SET, actors always consider whether exchanging or working together with other actors is beneficial or valuable for them and/or the company. Accordingly, if alignment exists among M-S-I actors, the behavior of the actors aims to obtain greater value for all three actors jointly, i.e., in accordance with the needs, demands, goals, and structures of all three actors. Thus, SET is an appropriate theoretical lens for investigating alignment because alignment occurs when all actors benefit from it. Moreover, SET highlights the following constructs as influences on social exchange: *power*, *structural linkage*, *commitment*, and *information sharing*. These and similar constructs have also been found in the previous conceptual studies listed in Table 1 (see, e.g., Homburg, Jensen, & Krohmer, 2008).

Conclusively, we build on the notion of general alignment using the theoretical lens of SET because this theory explicitly views exchange relationships as dynamic processes, which can also be applied to garner valued intraorganizational outcomes (Plouffe & Barclay, 2007). As sales actors often have considerable freedom regarding choosing those with whom they work, why they do so, and how often they interact (e.g., DelVecchio, 1998; Marshall, Moncrief, & Lassk, 1999; Plouffe & Barclay, 2007; Weitz & Bradford, 1999), we argue that SET serves to explain the extent to which M-S-I actors collaborate, prioritize, and align with each other, which is the focus of this study.

3. Literature review on conceptual alignment studies

To study alignment among M-S-I actors, it is necessary to analyze the progress that has already been made in this field, which can be used as a basis for this study. Much empirical work has focused on the alignment between marketing and sales or between IT and other departments and analyzed only pairs of actors (Graesch et al., 2022). Accordingly, it is important to understand the conclusions and limitations of previous conceptual alignment studies. It is also crucial to determine whether these factors are applicable to research on the three M-S-I actors because an analysis of all three M-S-I actors together seems to be lacking in the extant research.

To identify conceptual studies on alignment, a three-step approach based on the PRISMA guidelines, which has commonly been used in similar contexts (e.g., Saura et al., 2017), was employed for the literature review (Liberati et al., 2009). This method was used because no common term for ‘alignment’ has been used in the literature, and the names of the departments analyzed have not necessarily been included in the article’s titles. In step 1, we produced a general database for the terms “marketing”, “sales”, and “information technology” in combination with “digital transformation” as well as synonyms for alignment, such as “alignment”, “collaboration”, “cooperation”, “interaction” and “integration”. The selected time frame was 20 years, and the study focused on articles published in peer-reviewed journals to ensure that the articles met a certain threshold in terms of quality. In the second step, we studied the abstracts of the articles to identify studies that contributed to the subject of this research. Terms that frequently appeared in the search results but were not considered appropriate for the topic included “web analytics,” “branding,” “social media,” and “cocreation,” among others, because these fields address specific applications of IT tools, and because this study analyzes organizational

Table 1
Conceptual Studies of Alignment in Similar Contexts.

Studies	Actors	Conclusions/ Implications	Limitations
Homburg et al. (2008)	Marketing, sales	Conceptual domains of M&S <ul style="list-style-type: none"> Information sharing Structural linkages Power Orientations Knowledge 	Marketing and sales questions were answered by the same informant
Homburg, Workman Jr, and Jensen (2002)	Key account management (KAM)	Key constructs of KAM conceptualization contributing to business performance <ul style="list-style-type: none"> Activities Actors Resources Formalization 	Single-informant design
Le Meunier-FitzHugh and Piercy (2007a)	Marketing, sales	Antecedents contributing to business performance <ul style="list-style-type: none"> Market intelligence Organizational learning Interdepartmental conflict Management attitudes toward coordination Collaboration between M & S 	No data collected from sales and marketing managers; rather, data were collected from directors and chief executives.
Coltman, Tallon, Sharma, and Queiroz (2015)	IT, other	Historical review of the strategic IT alignment literature <ul style="list-style-type: none"> Fit Support Congruence 	Literature review, no additional empirical data
Biemans, Makovec Brenčić, and Malshe (2010)	Marketing, sales	M-S configurations and characteristics <ul style="list-style-type: none"> Functional separation Tasks of M Tasks of S Interfunctional communication Information sharing Collaboration Orientation and interfunctional relationships 	Informants drawn from different organizations – no matched pairs

structures through the theoretical lens of alignment. In step 3, we studied the remaining set of articles completely and excluded papers for the same reasons as previously mentioned. Additionally, we added forward and backward citation chains, exploring the references mentioned in this set of articles if they were cited in a relevant context and screening the reference list. For these additional articles, we repeated steps 2 and 3. The literature search returned numerous articles, 159 of which were studied completely (step 3); on this basis, a set of five articles was selected because these articles included conceptual studies of alignment.

These five conceptual studies, summarized in Table 1, identified concepts or characteristics of alignment or similar concepts in the context of a pair of actors. Three of these studies analyzed the marketing-sales alignment; one addressed IT actors alongside other departments within an organization, and one focused on key account management, which is relevant because of the overarching function of CSM.

Although the models used in these studies appear to have been different, there are certain commonalities. Le Meunier-FitzHugh and

Piercy (2007a) identified the antecedents of business performance in the context of marketing and sales alignment. Focusing on a higher level of organizational interplay, Homburg et al. (2002) instead developed constructs pertaining to the organizational structure of the interactions between key account management (KAM) and other actors. Homburg et al. (2008) developed conceptual domains using a comparable taxonomy, which resulted in a different model that contained structural and general domains. Similar results can be found in the work of Biemans et al. (2010), who identified terms that overlapped with those used in other studies. In the historical overview provided by Coltman et al. (2015), general aspects, such as the formfitting shape of the IT and other departments, were identified.

The conceptual studies thus uncovered provide a foundation for this study in terms of domains and constructs pertaining to alignment. However, four gaps remain to be filled. First, these studies relied on a single-informant design, which can risk single-informant bias regarding validity and reliability; accordingly, the design of this study should be triadic to obtain more accurate results than can be obtained through single-informant studies (Homburg, Klarmann, & Totzek, 2012). Second, none of the studies that were included in our literature review of 159 reviewed articles included a joint analysis of M-S-I actors. Therefore, it is necessary to examine previous models in terms of completeness and applicability. Over time, new domains of alignment have emerged, and updates to conceptual studies have become necessary, for example, in light of the inclusion of IT as a new actor in the context of M-S alignment as a result of digitization. Third, none of these conceptual studies provided measures for adjusting alignment, which is one of the aims of this study with the goal of providing appropriate suggestions and interventions for managers and scholars. Fourth, previous studies have not analyzed alignment dynamically but rather viewed it as a static phenomenon. However, alignment is dependent on various situations, such as the different touchpoints encountered throughout the customer journey, and the corresponding analysis should accordingly include all the different stages of customer interactions.

We conclude that although previous models for these working relationships remain relevant, they must be updated as a result of digitization and the increasing relevance of IT to marketing and sales actors; in addition, they should be further developed to support managers in their attempts to adjust alignment in accordance with dynamically changing customer interactions throughout the customer journey.

4. Methodology

The aim of this study was to explore the trilateral alignment of M-S-I actors in light of the consistent path of customer success management being central throughout the entire customer journey. In so doing, this study investigates which actors work together during which situations in the customer journey and considers the dynamic changes that occur in the actors' roles depending on customer interactions. According to SET, cooperating, committing and communicating form the basis for aligned working relationships (Leonidou, Leonidou, Coudounaris, & Hultman, 2013), which this study aims to explore for intraorganizational M-S-I actors. More specifically, this paper reports the results of a case study based on twelve interviews with four matched triads of M-S-I personnel (focusing on M-S-I managers as actors from all three departments of one and the same business unit) and applying the customer journey cycle as an auxiliary vehicle to analyze the internal interplay among these three actors. This analysis of the interplay at each stage of the customer journey is a consequential step in the research design, and the same type of questions are used for each stage of the customer journey (Kalbach, 2020; Lewrick, Link, & Leifer, 2018). Considering SET, the case study examines the exchanges that actors perform voluntarily at each stage, such as cooperating and communicating.

A formal case-study approach is the preferred research method when investigating a contemporary phenomenon—especially when the boundaries between the phenomenon and context are not clearly

evident (Yin, 2014)—this approach allows researchers to uncover patterns and determine meanings (Patton & Appelbaum, 2003). Moreover, a single case is suitable for in-depth investigation and description (Eisenhardt & Graebner, 2007; Järvinen & Taiminen, 2016) and, specifically, for the exploration of business networks and other subjects of industrial marketing in the context of B2B relationships (Järvensivu & Törnroos, 2010). Because of the consideration of these characteristics, this study investigates one case in detail rather than increasing the number of cases, as suggested by Dubois and Gadde (2002). In the present study, this case-study approach ensured the integration of the varying perspectives of all three departments through interviews with matched triads across four different business units. A global company in the transportation maintenance industry was chosen for the case study; this company provides services worldwide in both conventional and digital fields, including logistics, maintenance, consulting, hardware and software as a service. The selected company features more than 20,000 employees worldwide, market leadership with more than 800 B2B customers, and more than \$5 billion in annual revenue. Four business units, as illustrated in Fig. 2, were identified as suitable for four reasons. First, these units are all contained within the company, and each unit maintains its own sales, marketing and IT departments; accordingly, the results regarding these units can be compared and treated as referring to four different parts of the case study.

Second, the business units are distinct and offer entirely different B2B products to different global customers in different industries; thus, the findings of this research are not dependent on a specific segment. Third, the selection of business units within one company that share the same executive board and the same headquarters mitigates influences such as the impacts of different cultural, structural or legal variables, thereby allowing us to understand one set of variables instead of increasing the number of cases (Dubois & Gadde, 2002). Fourth and finally, the choice of this company was reinforced by the fact that one of the coauthors had access to its contact directory, which enabled the researchers to secure interviews with top management, a solid criterion for sample selection in qualitative research (Eisenhardt & Graebner, 2007; Gephart, 2004).

The interviews were conducted over two months in Fall 2021; the interviews took place either in person or online and were audio-recorded. Analysis was conducted after all interviews had been completed with the goal of mitigating selection bias (Flick, 2014). All twelve respondents' anonymized names (in which context the first letter

is used as an acronym for their role) are listed, and their roles and job positions are described in Table 2. Three of the twelve respondents were female.

Respondents from the four business units occupied various positions, including senior vice president, chief marketing officer, and chief information officer; other respondents were directors, team leaders, and operational managers. One business unit included the notion of customer success management in the job description for their sales managers. This set of interview respondents was chosen because the respondents had an overview of the overarching process beyond their own tasks and those of the other actors because they also interacted with other roles—a typical situation for higher and middle management. Furthermore, the respondents had the potential to influence the required responsibilities and explain the rationale underlying the existing relationships.

In total, twelve semistructured interviews with an average duration of 45 min were conducted with four triads, which represented a suitable method for qualitative research, especially in the context of exploring an emerging concept (van Esch & van Esch, 2013). The level of data saturation required for practical research was achieved with a total of twelve samples (Boddy, 2016). This was reached by the fact that no new enumerations, such as new customer interactions within the customer journey stages, were mentioned, and no new examples of intra-organizational cooperation between the actors were given, meaning that

Table 2
Selection of Companies and Respondents.

Role	Name	Position	Industry
Marketing	Maggie	Marketing Manager	Technical maintenance
Sales	Silas	Senior Vice President, Sales	
IT	Isabell	Director IT Strategy	
Marketing	Martin	Chief Marketing Officer	Consulting
Sales	Steven	Sales Manager	
IT	Ines	Chief Information Officer	
Marketing	Mike	Head of Marketing	Digital products
Sales	Simon	Director, Customer Success Management	
IT	Ian	Director, IT and Digital Development Operations	
Marketing	Max	Head of Marketing	IT systems
Sales	Sebastian	Sales Manager	
IT	Ivo	Senior Vice President, IT Solutions	

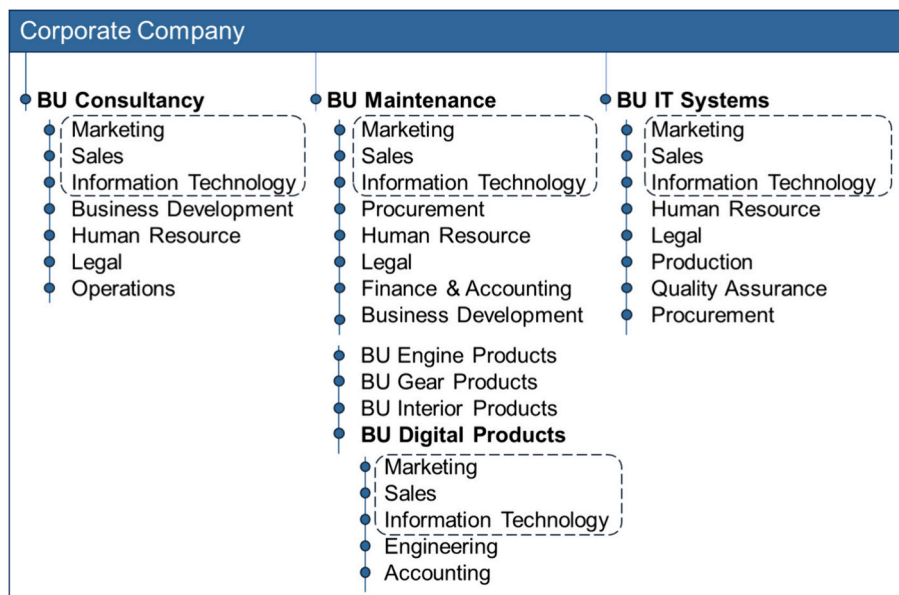


Fig. 2. Analyzed Business Units.

no further data add additional insights (Glaser, 1978). The clear approach of the interview structure during the customer journey helped to ensure that no possible interactions were left out, and open-ended questions were posed at the end of the interview to allow respondents to add any additional insights (Flick, 2014). The structure of the interviews, which examined the alignment observed in the relevant working relationships across each of the six stages of the customer journey, resulted in a total of twelve responses per stage, consisting of four matched triads, which is congruent with the ideal sampling process for case study research (Mayring, 2007).

In addition, field notes taken during the interviews and information collected from intranet files and organizational charts were included as further inputs to the data analysis, thus enhancing the construct validity of the case study data through triangulation and limiting bias, as advocated by, e.g., Goffin, Åhlström, Bianchi, and Richtnér (2019), such as single-informant bias or social desirability bias. The interviews were conducted by one of the authors; the other two authors were not involved in the interviews to ensure more objective oversight of the evaluation, as suggested by, e.g., Eisenhardt and Graebner (2007).

The analysis of the interview material was conducted according to the methodology of a qualitative content analysis (Mayring, 2015), consisting of four main steps. First, the interviews were divided into two parts: the general alignment and the stages of the customer journey. Second, the category of analysis was selected. In this case, we analyzed the responses regarding each stage of the customer journey in sequence; that is, we considered all twelve responses pertaining to the *be aware* stage, then those pertaining to the *consider* stage, etc., followed by the general alignment and cooperating thus explained. We applied an open inductive coding system to segments of the data to label and categorize them (Charmaz, 2006), starting with “challenges”, “benefits” and “requirements” for the trilateral interplay and its alignment. In the second step, the inductive codes were categorized by combining the codes into a higher-order category. In the third step, the categories drawn from the literature outlined in Section 2 were used to perform axial coding and combined with the coding paradigm. Based on these new and adapted categories, a further selective coding process was applied to all the interviews. The resulting coding scheme was compared with and adopted in light of the conceptual studies in the literature previously outlined. As a result, the final coding scheme represented a systematic combination of existing and newly abductively developed dimensions and attributes based on the material. The application of the coding system was reviewed multiple times by all three authors. The results provide quotations that have been translated into English.

5. Results

This exploratory study revealed that alignment is composed of six dimensions, which contain a total of 20 attributes, summarized in Table 3. These dimensions are grounded in the literature as domains or constructs, as explained for each dimension in the following subsections. The term ‘dimensions’ was used first to unify the terms used in the conceptual studies identified in Table 1 and second, in relation to multidimensional constructs. The ‘alignment’ of M-S-I actors emerges as a superordinate multidimensional construct, whereas the dimensions are themselves concepts that serve as specific manifestations that represent or constitute the construct (Edwards, 2001). The attributes’

characteristics shape the dimensions. The development of the attributes and dimensions is based on the procedures established by Rossiter (2002).

Based on these dimensions and intradimensional attributes, novel theoretical key propositions and directions for further research were developed. Together, these issues will be explained in the following sections and condensed into one proposition.

As explained in the previous section, the dimensions thus developed are based on previous conceptual studies in the literature, which were combined with and supplemented by the findings of this study. The resulting attributes and propositions provide novel insights for adjusting alignment.

5.1. Communication and Information

The first dimension is termed *communication and information*. It includes attributes pertaining to the *digitalization, proactivity and transparency* of information both from and to customers. Transparent information can be accessed by the actor at any time. Proactive information refers to situations in which one actor shares information actively with other actors at certain points in time.

“Keep each other in the loop about what’s happening at the various stages. On the marketing side, I also have a strong interest in finding out what the benefits of everything we’re doing here are.” (Max)

“So now, we never know exactly what situation [the customer] is in.” (Maggie)

Furthermore, the respondents highlighted the digital character of information sharing. Potential for adjustment can be found in the CRM system, which was perceived only as a documentation tool and offers a great deal of room for improvement regarding supporting all actors in terms of information transparency. Furthermore, through digital events and digital customer experience centers, information was provided transparently to the customer. A joint approach and consistent messages to the customer were considered to constitute a major alignment aspect in the context of marketing. Alignment within this dimension requires the unimpeded flow of information and regular communication because the respondents indicated that they never intended to withhold information but were nevertheless reluctant to share it due to the difficulties associated with the process. The key propositions for alignment based on this work can be summarized as follows:

P1. Transparent communication and digitalized information sharing must be established proactively.

5.2. Objectives

The second dimension encompasses *objectives*, including the attributes of *definition, prioritization and measurability*. This dimension allows the actors to orient themselves and offers them an understanding of which KPIs are crucial for the achievement of objectives.

“Everyone is measured by different KPIs; I think that sums it up, because the IT department also usually has [different] revenue targets.” (Martin)

Table 3
Dimensions and Attributes of Alignment.

Dimension	Communication & Information	Objectives	Mindset & Orientations	Power	Linkages & Resources	Yielded Knowledge & Skills
Attribute	<ul style="list-style-type: none"> Digitalization Proactivity Transparency 	<ul style="list-style-type: none"> Definition Prioritization Measurability 	<ul style="list-style-type: none"> Willingness & motivation Attentiveness & self-efficacy Customer-orientation Innovativeness 	<ul style="list-style-type: none"> Accessibility Responsibility Equality 	<ul style="list-style-type: none"> Availability Frequency Proximity Team orientation 	<ul style="list-style-type: none"> Product orientation Tool orientation Market orientation Capability

“[We need] closer alignment, a better coordination of goals—we do not have goal definition. I think this a major aspect. (...) For me by far, the most important are coordinated and set goals.” (Steven)

Particularly for IT actors, who are responsible for touchpoints throughout the customer journey, managers must link objectives with the ways in which they are measured. The goals defined in this context must match and not contradict each other. The respondents highlighted the importance of transparent objectives even for relatively closely related actors, such as those in marketing and sales, to ensure harmonized behavior.

P2. Objectives must be defined in an interdisciplinary way, including jointly prioritized, measurable key results.

5.3. Mindset and orientations

The third dimension of alignment encompasses *mindset* and *orientations*. *Orientations* are related to actors, customers and objects such as tools or product features (e.g., Peppard, 2007; Pullig, Netemeyer, & Biswas, 2006). This dimension was supplemented with the addition of *mindset* to include recent research areas on the judgments made by the actors as well as willingness or self-efficacy (e.g., Knight, Mich, & Manion, 2014; Li, Tang, Ma, Zhang, & Zhang, 2021). *Orientations* can be understood as the focus of the actors, e.g., on the customer or the product (Homburg et al., 2008). Accordingly, *customer orientation* is a core attribute.

“Every person is a salesperson in the organization.” (Steven)

“I would say that we are a very customer-focused organization that also understands IT as a core competence.” (Ines)

In contrast, *attentiveness* and *self-efficacy* are attributes that have increased in importance (e.g., Knight et al., 2014). They determine whether an actor is self-reliant or cares about other actors.

“Marketing doesn’t want to be impeded and that’s why there’s sometimes a gap that could be optimized or improved.” (Sebastian)

“An ideal collaboration would be letting sales act for certain IT products on its own.” (Simon)

“[W]e are excluded from [sales’] perspective because we are not sales.” (Maggie)

Furthermore, attribute *willingness and motivation* have been identified as indicating how actors judge the wishes of customers or other actors and the ways in which they use the tools provided (Li et al., 2021; Parent, Plangger, & Bal, 2011). For example, a customer’s product change requests may be critical to sales success but nevertheless be deemed uneconomical or not scalable by the IT department. Furthermore, marketing might prepare campaigns with a different focus than that adopted by sales.

“[Marketing and sales say] we need to make flyers or do anything else, or mailings, or do something on our website, or rank our website better on Google, but I don’t think that has any relevance at all.” (Ian)

“The problem with marketing-generated templates is that they have been designed in a quiet chamber on their own” (Sebastian).

“And then there is the question: is it really necessary?” (Maggie)

The attribute of *innovativeness* refers to the organization on a scale ranging from start-ups to enterprises (e.g., Picken, 2017). The respondents observed blurred lines among M-S-I actors in younger business units, unlike in mature organizations.

“I think the problem is that from the product portfolio, we should act as a start-up, but we learned the setup from our corporate context. (...) But there are blurred lines in startups.” (Ian)

“For very young products (...) the roles are closer and more enriched than for mature products.” (Isabell)

Overall, customer-oriented thinking and a sales-driven IT department were identified as adjustment levers that could be used to adjust alignment. In addition, a higher degree of alignment was observed in the working relationships of the younger product organizations that were analyzed; for example, by adopting an open and digital mindset toward collaborating, flexible mindsets and a culture of caring that promotes alignment could be fostered. A culture of caring and understanding was shown to adjust alignment. Thus,

P3. A joint motivation consisting of customer orientation, attentive collaboration and an innovative mindset must be established.

5.4. Power

The fourth dimension is termed *power* and includes the attributes of *accessibility*, *responsibility*, and *equality*. The responsible actor prevails in terms of the outcomes and ways of working (Homburg, Workman Jr, & Krohmer, 1999), which require alignment to avoid conflicting responsibilities and behaviors.

“Marketing will say get out of the way, and sales will say here we are.” (Isabel)

This example demonstrates that the actors want to assert themselves as a result of unclear responsibilities; they also want to make use of the power their roles grant them. No clear definitions of tasks exist even for the responsibilities assigned to marketing and sales, thus leading to unclear or disjunct responsibilities. To illustrate this point, sales might win customers by making certain promises regarding contractual fulfillment, but the promised fulfillment might not be matched by IT actors, who have different objectives, as illustrated by Martin:

“I just have the Java programmers free; the data scientists are not free; why are you selling this subject, moron!” (Martin)

Although sales actors are aware of this mismatch, they still act based on customer requests to achieve their own objectives.

“I don’t have to check whether the solution is technically feasible, whether it can be implemented technically, whether I can sell it at prices in line with the market, whether I am able to deliver—none of that matters to me for the time being.” (Steven)

“The [sales] manager faces a difficult situation; he must not act as the advocate of the customer. That’s so dangerous sometimes; it’s like Stockholm Syndrome.” (Ian)

Additionally, crucial responsibilities pertaining to customer touchpoints were outsourced for some of the business units that were analyzed, such as corporate website development and social media management, resulting in unclear responsibilities regarding change requests. Importantly, many respondents worried about unclear, overlapping or conflicting responsibilities regarding such tasks and highlighted this aspect as a major adjustment lever that could be used to adjust alignment.

Furthermore, *equality* is an identifiable attribute that refers to how individuals act in relationships (e.g., Day, 1997; Le Meunier-FitzHugh & Piercy, 2007b).

“[It] depends on the person (...) When a classic IT person speaks, a classic marketing person doesn’t always understand that immediately, I think.” (Max)

Whereas Isabell describes it as a “love-hate” and “difficult relationship,”

Ian criticizes the mentality as a “lack of appreciation, which I really mean in all directions.”

These findings demonstrate that the mentality of the actors determines their readiness to align with each other and their counterparts as well as

their feelings of loyalty and pride, which can encourage them to consider themselves to be different from other actors in some special way, a characteristic that can be called *esprit de corps* (e.g., Homburg et al., 2002).

Finally, the *accessibility* of power was perceived as a critical attribute pertaining to top management (Elbanna, 2013). In some companies, one top manager was responsible for all three roles—IT and marketing and sales—a situation that was judged as favorable for overall alignment.

“Sometimes you also need a bit of management attention, in the sense of a regular review, where you combine the priorities in marketing and sales.” (Mike)

The *accessibility* of top management impacts actors’ alignment. Respondents from business units that featured separate top management highlighted the need for inclusion.

P4. Responsibilities must be divided equally, and accessible top management must be established.

5.5. Linkages and resources

The fifth dimension encompasses *structural linkages* and *resources*. *Resources* include the attributes of *availability* and *team orientation*. In addition, *structural linkages* refer to the interplay between process *frequency* and *team proximity* (e.g., Panda & Rath, 2016; Workman Jr, Homburg, & Gruner, 1998). This situation is reflected in the involvement of the *team* members with each other or by the *frequency* of such involvement.

“IT is not involved at all, or we define something with sales and then, let’s say, throw it to IT on the table without direct or strong participation.” (Max)

“It comes up when something isn’t working or something needs to be optimized, as long as the thing is running (...), we don’t have any involvement.” (Ines)

In terms of *frequency*, the respondents mentioned various modes ranging from weekly to ad hoc meetings, including meetings held in reaction to system outages, which hinder sustainable alignment and increase tension in the relationship. *Availability* is typically related to unavailable resources in the context of marketing or IT.

Surprisingly, in some cases, the respondents found it difficult to describe the tasks for which the other actors were responsible. This difficulty is caused in part by the overlapping responsibilities described previously, but it is also caused by the proximity of the actors. Sales actors tend to act regionally, while IT actors are centralized at headquarters. Sales actors who are located abroad rarely interact with IT actors.

“I have an employee in each of the sales regions, one in Asia and one in the U.S. [Because] (...) we don’t need a one-size-fits-all approach but rather a concept that is adapted to the regions as well.” (Max)

Clear guidance for processes and regular exchange meetings among the actors can lead to aligned communication with and toward the customers. In terms of *team orientation*, silos should be dissolved, and the alignment should be consistent but nevertheless agile.

Furthermore, such alignment requires the availability of resources and consistently defined tasks as well as a focus on managing the best actor regarding customer interaction. Accordingly, alignment can be adjusted in terms of team setups, the frequency of meetings and the availability of resources.

P5. Close proximity and frequently used linkages must be established by available teams through joint processes.

5.6. Yielded knowledge and skills

The sixth dimension comprises the *knowledge* and *skills* thus yielded.

Knowledge in this context refers to the expertise of the respective actors in terms of all relevant tasks throughout the customer journey. This notion includes the attributes of *product orientation* and *(IT) tool orientation* as well as *market orientation*. Accordingly, knowledge and skills refer to the ways in which they are characterized in terms of products, tools and markets. The digital aspect of product knowledge has been identified as a newly emerging construct in the literature (Hoffman, Moreau, Stremersch, & Wedel, 2021).

“The interesting point is, when you have a marketing campaign and there are questions, where do you direct such questions? Because you get to the point—and I am in the B2B environment—where the questions become very technical. And we should have the requirement for ourselves that marketing—and I think we are not good at that—that marketing and sales should understand and have specific know-how about what our organization does technically and can explain it externally [to the customer] to a certain degree.” (Ian)

Additionally, the attribute of *market orientation* has been identified (see, e.g., Maltz & Kohli, 1996; Sombultawee & Boon-itt, 2018).

“That I, as a sales director, do not know now and have no way of finding out how many calls my employees make to customers per day. I don’t know in particular, or we as a company don’t know what feedback is coming in at the moment.” (Silas)

This goal could be achieved, for example, by applying CRM tools or analytics tools, which some of our respondents used, highlighting the benefits accordingly; however, other respondents were reluctant to use these tools because of their character as pure recording tools.

“Marketing automation (...) that in the future, there will be IT tools that provide this information.” (Steven)

Furthermore, automatically generated marketing material suited to customers’ demands was desired by the respondents.

The attribute of *capability* has been added because *knowledge* can be stored and transferred, but the *capability for skills* is either already owned by the actors, yielded by this process or must be developed.

On the other hand, it is also the case that the specialists often join us; if the topics are more complex, then a sales colleague with the appropriate skills will always be there and will then receive feedback directly from the customer and, of course, also pass this back to the IT department.” (Sebastian)

“[You need to decide] which person you want to let loose on customers and which one you don’t.” (Simon)

A broad variety of *skills* are necessary to address various needs on the part of actors. For example, IT actors need sales *skills* to demonstrate products as well as their own IT skills.

“In other words, you present yourself to the outside world with tools, so that the customer believes that you are a digitization company. So, I can’t go to the customer with an old computer, so to speak, that doesn’t work. If I’m selling digitization, I should know [...] what features there are and should deal with the standard. If I’m selling agility, I should know ‘scrum’ and be able to explain it.” (Ines)

All actors need comprehensive *knowledge*. In particular, marketing and sales actors must understand IT tools and digital products. Accordingly, experts in each role remain in place, but interdisciplinary teams with aligned skillsets are beneficial.

The following example highlights how an aligned combination of various *skills* could generate benefits:

“We all work for the same product, but all three departments, which are described here (...) typically have different strengths. And I believe that the strength lies in the combination of these three departments, because you don’t have such all-rounders. People who

can do everything are often the problem because then they can't do anything really well." (Ian)

P6. The capability for skills must be respected, selected and combined, and the yielded knowledge regarding the product, market and tools must be shared.

6. Intradimensional and interdimensional alignment

The first results of this study reveal six dimensions and their attributes for the alignment of the M-S-I actors' interplay. However, a further goal of the study was to address the challenge of *how* to adjust alignment. This goal can be achieved on two levels: first, on the micro level within each dimension, which we term intradimensional alignment, and second, on the macro level, which combines dimensions and which we term interdimensional alignment. In the following sections, these two contributions are developed, resulting in the developed *COMPLY* framework.

6.1. Intradimensional alignment

The findings of the previous sections and the propositions developed therein demonstrate the attributes of M-S-I actors' alignment. To explore the roots of alignment in a way that offers practical relevance, we performed additional axial coding regarding the interview material, including knowledge emerging from the literature, and enriched the results by asking *how* the alignment can be specifically adjusted. As many answers to the question of how to adjust alignment were given by the respondents, the axial coding involved a combination of inductive coding and abductive reasoning based on concepts drawn from the literature.

The findings are summarized in **Table 4**, which offers specific suggestions for how to adjust the alignment for each attribute of the M-S-I interplay based on adjustment levers in the context of customer interaction. All the attributes thus identified are associated with interventions aimed at adjusting intradimensional alignment, thereby offering helpful contributions for managers and scholars by providing examples of how the interplay conditions affect alignment.

The assorted intradimensional adjustment levers presented in **Table 4** were developed inductively based on the interview material and field notes and provide guidance for and examples of alignment.

6.2. Interdimensional alignment

Although the dimensions and attributes uncovered in this context, as well as existing models, have revealed important insights, the question of how the dimensions themselves can be combined remains unanswered. As outlined at the beginning of this study, only a few interdisciplinary theoretical studies have highlighted interventions that contribute to alignment. According to the findings of this research, we analyzed further axial coding of the interview material abductively and proposed novel interdimensional interventions that combined the dimensions. Specifically, the CSM construct requires such a combination of functions, which in turn requires intertwining their associated attributes.

Accordingly, we developed these points into a conceptual framework for the alignment of M-S-I actors. **Fig. 3** shows the resulting *COMPLY* framework that illustrates interdimensional alignment as an intertwined braid. The order of the dimensions shown in **Fig. 3** does not suggest a ranked structure or dependencies among the dimensions. However, only one important nuance should be noted: the practitioner should ensure that the attributes employed are complementary rather than oppositional or isolated and that the resulting dimensions comply with each other.

In turn, the overall alignment can be adjusted in two ways: first,

Table 4
Overview of Intradimensional Adjustment Levers for Each Attribute.

Dimension	Attribute	Intradimensional Adjustment Interventions (<i>How</i>)
Communication & Information	Digitalization	<ul style="list-style-type: none"> Integrate the entire customer journey into the CRM tool Digitalize customer communication on a joint basis
	Proactivity	<ul style="list-style-type: none"> Create a culture that focuses on learning from each other Define interfaces and forms of information sharing jointly
	Transparency	<ul style="list-style-type: none"> Ensure access to all available information in real time Monitor and track the status of customer interactions, including the reasons for decisions Make information transparent, including planned activities
Objectives	Definition	<ul style="list-style-type: none"> Identify objectives mutually Define consistent objectives for all actors
	Prioritization	<ul style="list-style-type: none"> Prioritize goals mutually Create a supportive environment to achieve every actor's goals
	Measurability	<ul style="list-style-type: none"> Become familiar with objectives and key results Share KPIs with all actors Implement a consensus metric for measuring KPIs Engage in joint discussion regarding progress and results
Mindset & Orientations	Willingness & motivation	<ul style="list-style-type: none"> Ensure awareness of the importance of each M-S-I task Ensure the engagement of all M-S-I actors throughout the customer journey
	Attentiveness & self-efficacy	<ul style="list-style-type: none"> Allow self-efficacy but avoid self-reliance Discuss and spread awareness of various perspectives and feasibility Establish a culture of care and trust Increase identification as a "we" Establish sales-driven IT developments Connect counterparts in the context of customer interactions Streamline and share external communication
	Customer-orientation	<ul style="list-style-type: none"> Establish a startup spirit Support a digital mindset Jointly convince top management Attract top management attention Strive to bundle managements' responsibilities
Power	Accessibility	<ul style="list-style-type: none"> Make joint decisions regarding tools, content and activities Ensure uniform responsibilities (of M-S-I) and share consequences throughout the CJ Establish a common understanding of tasks and roles
	Responsibility	<ul style="list-style-type: none"> Develop an understanding of and appreciation for various roles Respect different characters and personalities Ensure a uniform esprit de corps Jointly manage capacities Jointly prioritize projects Minimize non-value-adding activities Minimize coordination efforts regarding individual projects
	Equality	<ul style="list-style-type: none"> Define a continuous process for the interdisciplinary involvement of all necessary actors
Linkages & Resources	Availability	
	Frequency	

(continued on next page)

Table 4 (continued)

Dimension	Attribute	Intradimensional Adjustment Interventions (How)
Yielded Knowledge & Skills	Proximity	<ul style="list-style-type: none"> Distinguish between the need for regular meetings and case-by-case projects Balance the regional setting of sales and marketing with the centralization of IT Ensure proximity in terms of buildings or office designs
	Team orientation	<ul style="list-style-type: none"> Blur the lines between M-S-I teams Work in teams in an agile manner Represent the organization together
	Product orientation	<ul style="list-style-type: none"> Share product features and requirements with all actors Ensure awareness of consequences in cases of new product feature requests by customers
	Tool orientation	<ul style="list-style-type: none"> Increase knowledge of IT tool features and constraints in terms of marketing and sales Cocreate and choose tools jointly Establish marketing automation as a common goal for M-S-I actors
	Market orientation	<ul style="list-style-type: none"> Implement digital market intelligence solutions Provide customer data analytics support for sales process
	Capability	<ul style="list-style-type: none"> Train and combine the skillsets of M-S-I actors Ensure awareness of different skillsets Match tasks to skills

through intradimensional alignment, thereby ensuring that the attributes *comply* with one another; second, through interdimensional alignment, thereby creating overlapping interventions. Nonetheless, practitioners must apply intra- and interdimensional alignment in a way that is customized to their environments and teams, which could also lead to different combinations of the interdimensional alignment. The following interventions are suggested based on the results of this study:

First, one parent top management coordinator can be introduced who aligns the overall objectives, funnels communication and ensures joint priorities. Thus, the Intervention I_A consists of a combination of P_1 , P_2 , P_3 and P_4

I_A (P_1, P_2, P_3, P_4): One parent top management coordinator (e.g., a chief customer success manager) achieves overall alignment by bundling activities and objectives at a high level and by ensuring joint prioritizations, uniform responsibilities and customer-oriented mindsets throughout the complete customer journey.

This intervention is supported by quotes from respondents. The following examples serve to underscore this phenomenon:

Most important, for me by far most important are coordinated and set objectives. [...] In extremely close cooperation, closely aligned and working with a common mindset. (Steven)

Sometimes you also need a bit of management attention, in the sense of a regular review, where you bring together the priorities in marketing and sales. (Mike)

Second, a single digital tool for communication and transparent information sharing can be introduced to provide customer information, control customer interactions and thus establish links among actors. This tool should contain the previously defined objectives, track their key results and be accepted by the actors. Thus, intervention I_B combines dimensions P_1, P_2 and P_5 :

I_B (P_1, P_2, P_5): One jointly used digital tool promotes interdimensional alignment by ensuring transparent communication and information sharing as well as facilitating linkages in customer interaction process management and the transparent measurement of KPIs.

The intervention is supported by the following quotes:

[Integrate] a CRM tool [...] as] a common basis, where you can handle the data jointly can work together with the data. (Steven)

Yes, [we require] a joint KPI and closer coordination of strategic goals. (Martin)

[It is necessary to have] a regular exchange, communication. And we hope that we can improve this again via an internal, digital tool (Isabel)

Third, in addition to joint understanding and definition, diverse perspectives, skills and knowledge are important regarding the alignment of customer interactions. Flexibly formed teams complement each other. This goal could be achieved by, e.g., agile teams or interdisciplinary task forces because of the smaller planning increments and improved teamwork (Stare, 2014). Thus, the intervention I_C combines P_3, P_5 and P_6

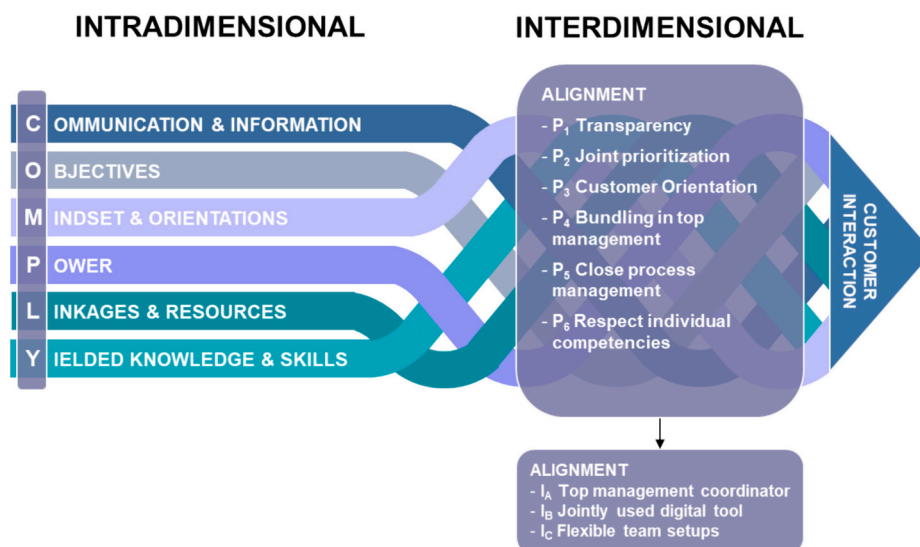


Fig. 3. COMPLY Framework.

I_C (P_3 , P_5 , P_6): Interdisciplinary and flexible teams that have a common orientation achieve interdimensional alignment by ensuring a balance of diverse skills and knowledge as well as by establishing individual linkages in terms of both frequency and availability.

The following quotes illustrate this intervention:

[Potentially] everyone works very closely together on staffing, putting the team together, introducing the employees, passing on profiles, including IT as a specialist. (Martin)

All three [...] M-S-I persons have typically different strengths. And I believe that the strength lies in a combination of these three. (Ian)

Communication, exchange, regularity somehow, and seeing yourself in a driver's seat and not in a consumer attitude. (Catherine)

These [IT] experts should then hold regular meetings with sales colleagues who are interested to bring them up to speed and tell them what is currently the state of the art. (Martin)

The three interdimensional interventions I_A , I_B and I_C resulted from abductive reasoning and combining the dimensions through the overlapping inclusion of various propositions and their attributes, as illustrated in Fig. 3. The interdimensional alignment framework addresses the question of *how* to align M-S-I actors by combining the dimensions of alignment, including their attributes. The purpose of the alignment culminates in the common task of interacting with customers seamlessly throughout the complete customer journey with the support of framework interventions.

7. Discussion

7.1. Theoretical contributions

This study is one of the first to consider the interplay among marketing, sales and IT (M-S-I) by collecting data from matched triads of M-S-I actors. The internal validity of this innovative research design was ensured by employing a rigorous research design to integrate the perspectives of each M-S-I actor within a single company as part of a step-by-step process throughout the various stages of the customer journey. The COMPLY framework contributes to the CSM literature by serving as a coordination mechanism for the specific attributes of the different actors that must be aligned or even combined if sales actors are to transition into the CSM role. The dimensions and attributes uncovered in this research build on the foundation of the conceptual studies conducted by Homburg et al. (2008), Homburg et al. (2002), Le Meunier-FitzHugh and Piercy (2007a), Coltman et al. (2015) and Biemans et al. (2010). The attributes added by the integration of IT in this study form the basis of the multidimensional COMPLY framework, which, in addition to the newly introduced propositions and interventions, supports managers and academics in the tasks of analyzing and adjusting alignment accordingly, and specifically, in the context of M-S-I actors' alignment. Specifically, the new dimension of *objectives* provides contributions by highlighting new adjustment levers for alignment, which are more relevant because of the increased number actors involved (three). In addition to general updates, the added attributes represent *digitization* and *innovation*, which have become more relevant in recent years. These constructs are grounded in the literature in general but have been missing from the conceptual models in the literature. For example, the importance of *knowledge* in the context of interdepartmental interactions has been frequently highlighted in both past and current research (Hoffman et al., 2021; Wang, Ahmed, & Rafiq, 2008). However, the attribute of *skills* requires separate attention because it differs from the attribute of *knowledge* (e.g., Gibson & Chesterman, 2022; Powell, 1992; Voogt & Pareja Roblin, 2023). Furthermore, the characterization of startups, accounting for both *innovativeness* (Picken, 2017) and the *mindsets* of different generations (Peppard, 2007; Pullig et al.,

2006), has not been included in previous models. The novel key propositions and interventions suggested by this study reveal avenues for design-oriented research aimed at designing organizational interfaces and conducting further analysis to validate the findings. Design-oriented research aims to highlight propositions that can serve as relevant inputs for management theories (van Aken & Romme, 2009).

The results and process of our case study show that analyzing more than two actors simultaneously is reasonable. Indeed, an approach that involves analyzing only two actors is a relic of a previous perspective, while the complex dynamics underlying these interactions have highlighted the necessity of broadening this perspective. The tendency to focus on only one discipline has hindered the progress of previous research, and a lack of cross-referencing has slowed the creation of interdisciplinary research (Tanskanen et al., 2017). Studies have highlighted the benefits and necessity of triadic views in the context of, for example, business services (e.g., Nätti, Pekkarinen, Hartikka, & Holappa, 2014; Schreiner & Rollins, 2015), and future studies are encouraged to overcome these barriers as well. Furthermore, studies on a wider macro scope, such as studies focusing on sales portfolios (e.g., Plouffe, Bolander, Cote, & Hochstein, 2016) or sales teams (e.g., Schmitz, 2013), have investigated aspects of working relationships. However, this triadic analysis of M-S-I focuses on the actors involved in daily customer interactions, which is not the case for, e.g., production, legal or R&D, and thereby adds a missing piece to the microlevel of dyadic M-S interactions. Nevertheless, as a next step the COMPLY framework could be applied to these actors who have indirect or rarely contact with the customer to further challenge role stereotypes in organizations. Fig. 2 shows further exemplar actors to whom the framework can be applied or validated, such as R&D, which conducts market research; legal, which manages customer contracts; Q&A, which handles customer complaints; or finance and accounting, which interacts with payment terms. However, we concede that some of the elements included in this framework might be unique to M-S-I actors' interplay and thus require adaptation; thus, the question of whether the framework is transferable to other domains remains open.

Applying SET as a theoretical lens for the intraorganizational alignment of the M-S-I actors, served to analyze the exchanges among the actors from the perspectives of prioritizing, collaborating and reducing efforts and time invested. Additionally, by applying the COMPLY framework as a coordination mechanism, this approach is suitable for explaining and adjusting alignment. Due to the high amount of freedom, how and with whom sales actors can perform their customer interaction (Plouffe & Barclay, 2007) and in the light of more responsibilities during CSM (e.g., Ballestra et al., 2017), sales actors will strive for intra-organizational exchanges that are effortless and valuable.

7.2. Managerial implications

The results of this empirical study have highly relevant managerial implications with regard to ensuring practical significance throughout the study design, a goal that has also been achieved by consistently including the answers provided by each of the M-S-I actors regarding every analyzed business unit as a way of including all perspectives and harmonizing the responses from the perspective of feasibility.

This study highlights the relevance of alignment in the context of M-S-I in general, which is still an evolving topic in the managerial context, as many respondents indicated after the interviews as general feedback. Thus, managers should be invited to proactively integrate IT actors into customer interactions and to foster awareness of alignment throughout the customer journey.

The dimensions of alignment, including their intradimensional attributes, help managers to understand the specific dimensions of alignment and indicate the scope in which interventions can be applied. Practitioners who aim to promote such alignment can use the COMPLY framework as an evaluation or alignment coordination mechanism in their organizations. Managers can use the theoretical lens of SET to

analyze the perceived efforts in communicating, collaborating, or prioritizing among actors to determine the value of exchanges. Alternatively, actors who perform certain tasks best during customer interactions can voluntarily take on those tasks to create value. However, respondents also requested command and control through top management to address situations where exchanges are not creating enough value compared to the effort invested.

Furthermore, this study provides a new understanding of CSM as a combination of various functions throughout the customer journey. CSM includes the functions of marketing, sales (including key account management) and IT, which must be aligned to promote CSM within the organization as a whole. For business units that aim to implement CSM, these attributes provide guidance with regard to promoting the transition of sales, marketing and IT actors into CSM. However, managers must decide which of those roles is to be transferred in the context of any particular business.

Finally, we suggest that managers should understand the specific attributes and dimensions associated with the context in which alignment should occur, which can reveal opportunities for and barriers to alignment. Although the *COMPLY* framework was intended to focus on the dimensions of alignment, it can also be used to analyze the barriers to alignment. Considering barriers in terms of the *COMPLY* framework attributes, this framework can support managers in identifying necessary actions in their organizations and improving the adjustment of M-S-I actors' interplay. The way in which this alignment can be adjusted within each individual organization is the decision of each manager, but this study highlights the key attributes and proposes specific adjustment interventions that are relevant to this task.

7.3. Limitations and directions for future research

Although the results of this study offer promising insights for both scholars and managers, it is not free of limitations; such limitations can nevertheless be addressed by future studies. First, the findings are based solely on respondents' statements and are neither complete nor independent of the industry and its products. Specifically, industries that require IT integration for conventional products and digital products are better suited than traditional businesses are, and emerging markets might also have a lower applicability in terms of IT alignment. Thus, further research is needed to confirm the generalizability of our findings; for example, based on a quantitative study, which should also account for the effects of excluded variables, such as type of customer, contract volume, and regions or branches. The dimensions and attributes listed in [Table 4](#) are neither complete nor necessarily transferrable but rather indicate key areas and can be used as a basis for adjusting alignment. Furthermore, variations in alignment could be developed for each stage of the customer journey. While the evolution of CSM is still relatively new, this study asserts a connection between the customer journey and CSM; for instance, the joint activities of IT and sales actors during the considering and confirming stages of the customer journey. Future studies could further explore the relationship between CSM and the customer journey, confirming M-S-I alignment and beyond.

Although we took steps to mitigate biases, as outlined in the methodology section, such as by selecting respondents before conducting interviews to avoid selection bias ([Flick, 2014](#)) and using triangulation with matched triads to avoid single-informant and social desirability biases, we acknowledge that some biases may still be present. Interviewer bias and confirmation bias cannot be completely eliminated due to interactions with respondents. However, we attempted to mitigate these biases by asking standardized questions per customer journey stage in the same order (e.g., [Pannucci & Wilkins, 2010](#)) and having one author conduct the interviews while the other two authors provided objective oversight of the evaluation ([Eisenhardt & Graebner, 2007](#)). Future studies, such as quantitative evaluations, may also help overcome these biases.

Finally, the opportunities for future research that we have identified

should also contribute to the debate regarding how to measure alignment most effectively.

7.4. Conclusion

Aligning actors within an organization to facilitate seamless customer success management is essential for managers but remains challenging. This study is, to our knowledge, the first to conduct interviews with matched triads of M-S-I actors within the same companies to ensure the integration of different perspectives, coherent answers and limited influencing factors simultaneously. This exploration of the interplay of M-S-I actors reveals that alignment among these actors is essential in the context of CSM and includes various dimensions and intradimensional attributes. Six dimensions of M-S-I alignment were demonstrated: *Communication & information sharing*, *Objectives*, *Mindset & orientations*, *Power*, *Linkages & resources*, and *Yielded knowledge & skills*. The findings result in the *COMPLY* framework, which associates attributes with these dimensions, which are subsequently complemented by developed intradimensional interventions. The findings of this research suggest novel key propositions that scholars and managers can use to analyze and adjust both intradimensional and interdimensional alignment for organizational interfaces and identify paths for design-oriented research and validation in CSM. The interventions thus suggested encompass (I_A) one coordinator from top management who bundles activities and objectives and serves as a role model for a customer-oriented mindset; (I_B) one jointly used digital tool to promote communication and transparent information sharing; and (I_C) flexible or agile teams with a common orientation that also integrate diverse interdisciplinary skills. Consequently, the initial research question of how the interplay of M-S-I actors is aligned in the context of customer interactions and how this alignment can be adjusted was answered by applying the *COMPLY* framework within organizations. The dimensions and attributes provide measures for analyzing alignment, while the propositions and interventions provide measures for adjusting the alignment among M-S-I actors, making it possible for organizations to achieve effective CSM. Once an aligned customer interaction is established, the customer no longer perceives the interactions that occur throughout his journey as a patchwork but rather perceives himself as being welcomed on a knitted red carpet on his or her journey to success.

CRedit authorship contribution statement

Jan Philipp Graesch: Writing – review & editing, Writing – original draft, Methodology, Investigation, Data curation, Conceptualization. **Susanne Hensel-Börner:** Validation, Supervision, Conceptualization. **Jörg Henseler:** Supervision. **Jan Philipp Graesch:** Writing – review & editing, Writing – original draft, Methodology, Investigation, Data curation, Conceptualization. **Susanne Hensel-Börner:** Validation, Supervision, Conceptualization. **Jörg Henseler:** Supervision.

Data availability

Data will be made available on request.

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